

## Transcript: Estefania

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### Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits in a Car. My name is Stephanie. How can I assist you? Hi, um, I called yesterday, um, about signing up for benefits, and, um- Yes. ... uh, the lady I talked to, whose name I'm now totally blanking on, um, said that she would need to call me back today, um, to make sure that my assignment had started, I think. She had to double-check the start date. Okay. Um, I can double-check real quick. What's the name of your staffing agency as well as the last four of your social? Creative Circle, and it's 2202. And for security purposes, could you verify your full address as well as your date of birth? Um, 1925 Stockton Street, San Francisco, California 94133, and my D-O-B is 09/26/83. Thank you. Is it 725-5476, your phone number? Yeah. Mm-hmm. Okay. And then, I have sarah.j.lastname@gmail.com? Yes. Okay. So it looks like she contacted you today around, like, 4:26, um, to let you know that you are eligible to enroll. Mm-hmm. Okay, great. So what does that sound like- And do you want to go, um, did you want to go ahead and do that right now? 'Cause we can go ahead and do it. Yep. Okay. Okay. Great. Um, did you know what plans they have to offer or did you want me explain the plans to you? 'Cause I could do that as well. Um, I wanted just everything and the, the premier, the, the premier one. So I wanted the H U... Sorry, let me pull it up again. I wanted everything basically. Okay. And then they are weekly deductions, all right? Mm-hmm. I just wanted to let you know. Um, so what medical plan though? Because they offer three different medical plans, which are- The premier one, whatever the top one is. Okay. Um, did you want- Yeah. ... the employee-only option or did you wanna add dependent? Mm-hmm. Employee only. Okay. So the Insure Plus Premier and the Healthy MEC. Okay, thank you. Okay. So I have, for your medical, I have the Insure Plus Premier, that's a \$34.91 of a weekly deduction for employee only. I also have the MEC TeleRx, which is a weekly deduction of \$15.58. Um, did you wanna add vision as well for \$3.64? Yes. Vision, dental, all the other stuff. Critical illness, accident, telehealth. Okay. I don't think I need FreeRx though. Okay. So the, um, FreeRx comes with the MEC TeleRx included. Oh. Oh, right. I did, I, I think I read that. Thank you. Okay. And then did you want the group accident? I know you said everything, but I just wanna make sure before I select your stuff. What is group accident? So let me go over that with you. So that's like, okay. So if you get hurt, um, that's what it is. So for hospital emergency room, they'll cover \$250. The vision office, \$50. Emergency dental work, it'll cover \$50. Hospital- Okay. Yeah. ... medicine, \$250. So yeah. Okay. Okay. Cool. Yeah, I'll do that things. What about behavioral health? Uh, yes, please. Mm-hmm. Okay. All right, let me make sure. Okay. So, so far I have the Insure Plus Premier, which is \$34.91. I have dental for \$3.64. Um, they include term life, which is \$2.11 in vision, which is \$2.15. Critical illness for \$2.51. Group accident for \$2.01. Behavioral health for \$1.50, and I have the MEC TeleRx for \$15.58. Um, that comes out for a weekly deduction of \$64.41. Great. Do you allow Creative Circle to make those

weekly deductions? Yes. Okay. I was gonna let you know that it looks like the MEC TeleRx plan is the only plan outta your coverage that's under Section 125. So what Section 125 is, it allows you to pay that plan with pre-tax dollars. However, to cancel the MEC TeleRx or to make any changes, you would have to be within the first 30 days of receiving your first check or be within the company's open enrollment period, which for- Okay. ... Creative Circle, let me see when that is so that you, you know as well. So for Creative Circle, their company open enrollment period is gonna be December 23rd of this year until January 31st of the upcoming year. So if for some reason you decide that you don't like the MEC TeleRx, you're welcome to give them a call before your 30 days of your personal open enrollment period is up or when they're in their company open enrollment period, which is between the dates of December 23rd up until January 31st. Okay, great. Thank you. Okay? You're welcome. All right. One second. Okay. Please allow one or two weeks for your employer to start making those deductions. Once you see the first deduction of \$64.41 come out of your check, the following Monday is when your coverage becomes active. And then that first week of your activation week, that Friday is when you should be receiving your dental... vision, and any feed card. And then, I did like to advise you that for the Entry Plus Premier ones, we normally don't send those out, um, physically- Mm-hmm. Right. ... but that first week of your activation week, if you do want a physical copy sent to your house, you're welcome to give us a call once you have active coverage, and we can go ahead and order that for you. But you would have- Okay. ... to have active coverage for us to request, request it, of course. Okay. Great. And then, um- I'm sorry, can you repeat when does, when doesn't, when does coverage start? Yes. Could you say that part again? Oh. Once he, uh, so please allow one or two weeks for your employer- Mm-hmm. ... to start making those deduction of \$64.41. So once you see that first deduction come out of your check of \$64.41, the following- Mm-hmm. ... Monday is when you have active coverage. Okay. Great. Okay. Thanks for repeating that. Thank you. Uh, you're welcome. Okay. Cool. And before I let you go, though, um... Mm-hmm. Since you chose the group accident, critical illness, and term life, I do need a beneficiary for these. So who would you like to put down? Oh, um, is there any way I can do that online, 'cause it'll probably be a couple people, but... Uh, yeah, well, I think I would have to do it, but let me just doublecheck. Okay. Thank you for holding, ma'am. Mm-hmm. Um, so you could, but the faster you do it, the better. Mm-hmm. I'm not saying something's gonna happen to you, but just in case- ... something does happen to you. Um, okay. Uh, uh, I'll, yeah, I know who to put. Um, are you ready? Yes, ma'am. I need their first name. Mm-hmm. Yeah, what info, what info do you need actually? I really just need their first name, last name, their relationship to you, and how much percentage. And, uh, if you are adding multiple people, we would have to distribute it evenly. Okay. Yeah. I'll just put one person for now. Um, Annabelle. A... Let me just... Hold on one second. Okay. I think it's A-N-N-A-B-E-L-L-E. Mm-hmm. And last name's Buy. It's B-U-Y. Uh-huh. Um, and she's my goddaughter. Okay. All right. And then you said that was B-E-L-L-E for the middle name? Annabelle. Annabelle. Uh, one, one, one name. Okay. Oh, okay, good. A-N-N-A-B-E-L-L-E. Yeah. Okay. Thank you. Okay. There you go. And then, that was B-U-Y? Mm-hmm. All right. Okay. Got that. Okay. And then, if you ever want to add somebody else, you're welcome to give us a call. Okay. Cool. Thank you. You're welcome. I was gonna let you know, once you've received your, like, cards and stuff, um, if you have any questions about providers, and your card is gonna give you the multi-plan network phone number, as well as who the carriers are and the pharmacy information. So once you get

everything, it'll have all the information included, and it'll guide you. Okay. Mm-hmm. Great. Thank you so much. You've been so friendly and nice. So thank you. Thank you. I hope you have a good day. Okay. Thank you for calling You two have a good weekend. and choosing our products. Thank you. Thanks. Bye. Thanks. Bye.

## Conversation Format

Speaker speaker\_0: Your call may be monitored or recorded for quality assurance purposes.

Speaker speaker\_1: Thank you for calling Benefits in a Car. My name is Stephanie. How can I assist you?

Speaker speaker\_2: Hi, um, I called yesterday, um, about signing up for benefits, and, um-

Speaker speaker\_1: Yes.

Speaker speaker\_2: ... uh, the lady I talked to, whose name I'm now totally blanking on, um, said that she would need to call me back today, um, to make sure that my assignment had started, I think. She had to double-check the start date.

Speaker speaker\_1: Okay. Um, I can double-check real quick. What's the name of your staffing agency as well as the last four of your social?

Speaker speaker\_2: Creative Circle, and it's 2202.

Speaker speaker\_1: And for security purposes, could you verify your full address as well as your date of birth?

Speaker speaker\_2: Um, 1925 Stockton Street, San Francisco, California 94133, and my D-O-B is 09/26/83.

Speaker speaker\_1: Thank you. Is it 725-5476, your phone number?

Speaker speaker\_2: Yeah. Mm-hmm.

Speaker speaker\_1: Okay. And then, I have sarah.j.lastname@gmail.com?

Speaker speaker\_2: Yes.

Speaker speaker\_1: Okay. So it looks like she contacted you today around, like, 4:26, um, to let you know that you are eligible to enroll.

Speaker speaker\_2: Mm-hmm. Okay, great. So what does that sound like-

Speaker speaker\_1: And do you want to go, um, did you want to go ahead and do that right now? 'Cause we can go ahead and do it.

Speaker speaker\_2: Yep. Okay.

Speaker speaker\_1: Okay.

Speaker speaker\_2: Great.

Speaker speaker\_1: Um, did you know what plans they have to offer or did you want me explain the plans to you? 'Cause I could do that as well.

Speaker speaker\_2: Um, I wanted just everything and the, the premier, the, the premier one. So I wanted the H U... Sorry, let me pull it up again. I wanted everything basically.

Speaker speaker\_1: Okay. And then they are weekly deductions, all right?

Speaker speaker\_2: Mm-hmm.

Speaker speaker\_1: I just wanted to let you know. Um, so what medical plan though? Because they offer three different medical plans, which are-

Speaker speaker\_2: The premier one, whatever the top one is.

Speaker speaker\_1: Okay. Um, did you want-

Speaker speaker\_2: Yeah.

Speaker speaker\_1: ... the employee-only option or did you wanna add dependent?

Speaker speaker\_2: Mm-hmm. Employee only.

Speaker speaker\_1: Okay.

Speaker speaker\_2: So the Insure Plus Premier and the Healthy MEC.

Speaker speaker\_1: Okay, thank you. Okay. So I have, for your medical, I have the Insure Plus Premier, that's a \$34.91 of a weekly deduction for employee only. I also have the MEC TeleRx, which is a weekly deduction of \$15.58. Um, did you wanna add vision as well for \$3.64?

Speaker speaker\_2: Yes. Vision, dental, all the other stuff. Critical illness, accident, telehealth.

Speaker speaker\_1: Okay.

Speaker speaker\_2: I don't think I need FreeRx though.

Speaker speaker\_1: Okay. So the, um, FreeRx comes with the MEC TeleRx included.

Speaker speaker\_2: Oh. Oh, right. I did, I, I think I read that. Thank you.

Speaker speaker\_1: Okay. And then did you want the group accident? I know you said everything, but I just wanna make sure before I select your stuff.

Speaker speaker\_2: What is group accident?

Speaker speaker\_1: So let me go over that with you. So that's like, okay. So if you get hurt, um, that's what it is. So for hospital emergency room, they'll cover \$250. The vision office, \$50. Emergency dental work, it'll cover \$50. Hospital-

Speaker speaker\_2: Okay. Yeah.

Speaker speaker\_1: ... medicine, \$250. So yeah.

Speaker speaker\_2: Okay.

Speaker speaker\_1: Okay.

Speaker speaker\_2: Cool. Yeah, I'll do that things.

Speaker speaker\_1: What about behavioral health?

Speaker speaker\_2: Uh, yes, please.

Speaker speaker\_1: Mm-hmm. Okay. All right, let me make sure. Okay. So, so far I have the Insure Plus Premier, which is \$34.91. I have dental for \$3.64. Um, they include term life, which is \$2.11 in vision, which is \$2.15. Critical illness for \$2.51. Group accident for \$2.01. Behavioral health for \$1.50, and I have the MEC TeleRx for \$15.58. Um, that comes out for a weekly deduction of \$64.41.

Speaker speaker\_2: Great.

Speaker speaker\_1: Do you allow Creative Circle to make those weekly deductions?

Speaker speaker\_2: Yes.

Speaker speaker\_1: Okay. I was gonna let you know that it looks like the MEC TeleRx plan is the only plan outta your coverage that's under Section 125. So what Section 125 is, it allows you to pay that plan with pre-tax dollars. However, to cancel the MEC TeleRx or to make any changes, you would have to be within the first 30 days of receiving your first check or be within the company's open enrollment period, which for-

Speaker speaker\_2: Okay.

Speaker speaker\_1: ... Creative Circle, let me see when that is so that you, you know as well. So for Creative Circle, their company open enrollment period is gonna be December 23rd of this year until January 31st of the upcoming year. So if for some reason you decide that you don't like the MEC TeleRx, you're welcome to give them a call before your 30 days of your personal open enrollment period is up or when they're in their company open enrollment period, which is between the dates of December 23rd up until January 31st.

Speaker speaker\_2: Okay, great. Thank you.

Speaker speaker\_1: Okay? You're welcome. All right. One second. Okay. Please allow one or two weeks for your employer to start making those deductions. Once you see the first deduction of \$64.41 come out of your check, the following Monday is when your coverage becomes active. And then that first week of your activation week, that Friday is when you should be receiving your dental-... vision, and any feed card. And then, I did like to advise you that for the Entry Plus Premier ones, we normally don't send those out, um, physically-

Speaker speaker\_2: Mm-hmm. Right.

Speaker speaker\_1: ... but that first week of your activation week, if you do want a physical copy sent to your house, you're welcome to give us a call once you have active coverage, and

we can go ahead and order that for you. But you would have-

Speaker speaker\_2: Okay.

Speaker speaker\_1: ... to have active coverage for us to request, request it, of course.

Speaker speaker\_2: Okay. Great.

Speaker speaker\_1: And then, um-

Speaker speaker\_2: I'm sorry, can you repeat when does, when doesn't, when does coverage start?

Speaker speaker\_1: Yes.

Speaker speaker\_2: Could you say that part again?

Speaker speaker\_1: Oh. Once he, uh, so please allow one or two weeks for your employer-

Speaker speaker\_2: Mm-hmm.

Speaker speaker\_1: ... to start making those deduction of \$64.41. So once you see that first deduction come out of your check of \$64.41, the following-

Speaker speaker\_2: Mm-hmm.

Speaker speaker\_1: ... Monday is when you have active coverage.

Speaker speaker\_2: Okay. Great. Okay. Thanks for repeating that. Thank you.

Speaker speaker\_1: Uh, you're welcome.

Speaker speaker\_2: Okay. Cool.

Speaker speaker\_1: And before I let you go, though, um...

Speaker speaker\_2: Mm-hmm.

Speaker speaker\_1: Since you chose the group accident, critical illness, and term life, I do need a beneficiary for these. So who would you like to put down?

Speaker speaker\_2: Oh, um, is there any way I can do that online, 'cause it'll probably be a couple people, but...

Speaker speaker\_1: Uh, yeah, well, I think I would have to do it, but let me just doublecheck. Okay. Thank you for holding, ma'am.

Speaker speaker\_2: Mm-hmm.

Speaker speaker\_1: Um, so you could, but the faster you do it, the better.

Speaker speaker\_2: Mm-hmm.

Speaker speaker\_1: I'm not saying something's gonna happen to you, but just in case- ... something does happen to you.

Speaker speaker\_2: Um, okay. Uh, uh, I'll, yeah, I know who to put. Um, are you ready?

Speaker speaker\_1: Yes, ma'am. I need their first name.

Speaker speaker\_2: Mm-hmm. Yeah, what info, what info do you need actually?

Speaker speaker\_1: I really just need their first name, last name, their relationship to you, and how much percentage. And, uh, if you are adding multiple people, we would have to distribute it evenly.

Speaker speaker\_2: Okay. Yeah. I'll just put one person for now. Um, Annabelle. A... Let me just... Hold on one second. Okay. I think it's A-N-N-A-B-E-L-L-E.

Speaker speaker\_1: Mm-hmm.

Speaker speaker\_2: And last name's Buy. It's B-U-Y.

Speaker speaker\_1: Uh-huh.

Speaker speaker\_2: Um, and she's my goddaughter.

Speaker speaker\_1: Okay. All right. And then you said that was B-E-L-L-E for the middle name?

Speaker speaker\_2: Annabelle. Annabelle. Uh, one, one, one name.

Speaker speaker\_1: Okay. Oh, okay, good.

Speaker speaker\_2: A-N-N-A-B-E-L-L-E. Yeah.

Speaker speaker\_1: Okay. Thank you. Okay. There you go. And then, that was B-U-Y?

Speaker speaker\_2: Mm-hmm.

Speaker speaker\_1: All right. Okay. Got that.

Speaker speaker\_2: Okay.

Speaker speaker\_1: And then, if you ever want to add somebody else, you're welcome to give us a call.

Speaker speaker\_2: Okay. Cool. Thank you.

Speaker speaker\_1: You're welcome. I was gonna let you know, once you've received your, like, cards and stuff, um, if you have any questions about providers, and your card is gonna give you the multi-plan network phone number, as well as who the carriers are and the pharmacy information. So once you get everything, it'll have all the information included, and it'll guide you.

Speaker speaker\_2: Okay.

Speaker speaker\_1: Mm-hmm.

Speaker speaker\_2: Great. Thank you so much. You've been so friendly and nice. So thank you.

Speaker speaker\_1: Thank you.

Speaker speaker\_2: I hope you have a good day.

Speaker speaker\_1: Okay. Thank you for calling

Speaker speaker\_3: You two have a good weekend.

Speaker speaker\_1: and choosing our products. Thank you.

Speaker speaker\_2: Thanks. Bye.

Speaker speaker\_1: Thanks. Bye.